DEPARTMENT OF HEALTH AND FAMILY SERVICES
DIVISION OF HEALTH CARE FINANCING
ADMINISTRATOR'S MEMO SERIES

NOTICE: 05-02

DISPOSAL DATE: Ongoing

RE: IMPLEMENTATION
OF THE CARES WORKER
WEB (CWW)

DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SOLUTIONS
ADMINISTRATOR'S MEMO SERIES

NOTICE: 05-02

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RE: IMPLEMENTATION
OF THE CARES WORKER
WEB (CWW)

To: County Departments of Human Services Directors
            County Departments of Social Services Directors
            W-2 Agency Directors
            Tribal Chairpersons/Human Services Facilitators
            Tribal Economic Support Directors
            Job Center Coordinators

From: Mark B. Moody   /s/
            Administrator
            Division of Health Care Financing

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            Administrator
            Division of Workforce Solutions

Purpose

This Administrator's Memo describes the new CARES Worker Web, Project One (CWW-1) and the manner in which the Departments of Health and Family Services and Workforce Development will implement this system enhancement.

Background

CWW-1 is the first of several projects that will transition CARES from a mainframe user interface system with screens to an Internet or web-based user interface with web pages. This first project:

- Provides the infrastructure for all CARES web-based user interfaces (security, web servers, web software, software interfaces between mainframe and web-based portions of CARES);
- Replaces current mainframe Client Registration and the majority of Application Entry screens (up to the eligibility determination) with web-based pages; and
- Adds functionality to the intake and update processing that is expected to make CARES more user-friendly.

Our objective with all of the CARES Worker Web Projects is to create a user interface that is intuitive and easier to use and learn for workers and support staff who update Income Maintenance, Child Care and W-2 program cases. This objective supports all of our program goals, which include reducing local agency workload, increasing payment accuracy and improving customer service.

The CARES Worker Web projects provide a new interface for the user, but do not change the mainframe CARES processing of eligibility or the data structure. If CARES were a house, the CARES Worker Web would be like providing new windows and doors, but not remodeling the inside of the house. CWW-1 incorporates new functionality to improve the user experience when using CARES. When compared to the CARES mainframe user interface, the CWW-1 has new or enhanced functionality that:

- Takes advantages of the functionality of a web-based application, including the use of a mouse, better graphics and formatting, page scrolling, drop down boxes, intelligent selection capabilities (i.e., calendars, reference tables), and other user-friendly web features.

- Eliminates many questions and related data entry that are no longer *relevant* to the business functions of the Medicaid, BadgerCare, FoodShare, Childcare and W-2 programs.

- Focuses Client Registration on those functions that must be completed when a potential applicant first contacts the agency.

- Asks only questions of individuals who are *relevant* to the determination of eligibility for the case, rather than keeping information about others who are not and would not be part of the Medicaid/BadgerCare, FoodShare, Childcare or W-2 program eligibility determination.

- Implements an Intelligent Driver Flow that prompts the worker to ask questions that pertain to the type of individual (or family/household) that is applying for assistance by only going to those pages with questions relevant to the requested programs of assistance. Workers are prompted to ask only relevant questions based upon the requested programs and other information gathered during the review, intake, or change process.

- Provides a direct, on-line link to Policy Help (Medicaid Handbook, FoodShare Handbook, Income Maintenance Policy Handbook), Systems Help and introduces Process Help. Process Help incorporates instructions from the CARES Guide, Desk Aides, Operations Memos, and specific process information formerly in the Medicaid Eligibility Handbook, the FoodShare handbook, the Income Maintenance Manual, the Child Care Manual and the W-2 Manual.

- Moves the clearance of applicants and the assigned CARES personal identification numbers (PINs) out of the Client Registration system and totally into the Application Entry system under an eligibility workers control.

- Simplifies querying case and individual information by providing summary screens.

- Introduces a security system that allows workers to move between the mainframe-based user interface screens and the web-based pages.

- Incorporates more intuitive navigation. This enhanced navigation eliminates the need for the four-digit 'tran' codes and makes it easier to view historical information.

- Spells out codes and questions on the web pages, rather than relying on numeric codes, abbreviations and acronyms.

CWW-1 Implementation

We are focusing our efforts during the initial stage of the implementation of CWW-1 on those local agency and state staff who update Client Registration (CR) and Application Entry (AE) in CARES and those who supervise or provide technical assistance to those agency staff. After we have implemented CWW-1 for all local agencies across the state who determine eligibility or handle client registration, we will expand our focus to other users of CARES who query the data collected on CR and AE screens. The mainframe screens that are being replaced by the web-based pages will continue to be available until we are certain that everyone who updates or queries CR and AE are trained. A few key points to remember:

- The mainframe screens will still exist for query purposes until that occurs in the first part of 2006.
- The data that exists in CARES does not change with the CWW. CWW only provides a different window on the same data.
- Even if data is entered through CWW, the mainframe screens will display that data.

CWW-1 Pilots

We want to make sure that the implementation of CWW-1 is successful, so we have decided to 'pilot' CWW-1 in several agencies and then 'roll-out' CWW-1 statewide in four stages. We will pilot in two different phases:

In phase one, we will pilot in two agencies to ensure that the CWW-1 functions smoothly when handling a variety of eligibility tasks (client registration, intake, review, changes, etc.). We will obtain feedback from these workers on the intelligent driver flows, the look and feel of the web pages, navigation, the text of questions asked, the impact on business flow in the agency, etc. We will make changes to the CWW-1 based upon this input. Jefferson and Sauk Counties have agreed to participate in the first pilot phase.

In phase two, we will pilot CWW-1 and the distance learning modules for CWW-1 in other agencies. We will ask for the same type of feedback from these agencies on CWW-1 as identified for the phase one pilot agencies. In addition, we will be asking them to provide feedback on the distance learning modules of CWW-1 training. We have asked Dane County, Rock County, Columbia County IM agency and the Columbia County W-2 agency to participate in the second pilot phase.

CWW-1 Kickoff Event

Because we understand that program recipients in these service agencies will move to other counties and W-2 agencies, we will need to be prepared for agency-to-agency case transfers into agencies that have not yet moved to the CWW. Therefore, we have identified a need to train targeted staff across the state to handle these transfer cases using the CWW-1. We have also identified the need to support local IM and W-2 agency staff as they access and complete the distance learning courses.

For this purpose we will be holding an event for agency trainers, CARES Coordinators and the agency staff persons responsible for handling case transfers. This event will provide designated agency representatives with an advance look at training materials and how to use them. It will also provide instructions on how to deal with agency transfer cases that have been transitioned to the CWW. We will offer this event on two separate dates in two different locations.

Each agency may send up to three people to this event. The attendees should be the agency's CARES coordinator, the person in the agency who deals with training issues, and either the Policy Coordinator or someone else the agency chooses to send. At least one of these individuals must be someone with a caseload who can manage CWW cases if they transfer into their agency prior to agency's 'Go Live!' date.

Attendees will be granted early access to CWW Production Update so that they can work with transferred cases and help build CWW expertise. These people will also be granted access to the distance learning materials as soon as they become available (early April 2005), and will not have to wait until their agency's planned rollout timeframe to access them. This will allow them to understand CWW-1 well enough to be able to work with transfer cases and to build up expertise prior to their agency's actual implementation.

Topics covered at this kickoff event will include an overview of CWW-1 implementation plans, an update on pilot progress as of that time, a preview of the training materials, and an overview of CWW-1 functionality and instructions about how to deal with transfer cases until you have completed the CWW training program.

On March 23, the first event will be held in Madison at the Monona Terrace. A second event is scheduled for April 5 at the Plaza Hotel and Suites in Wausau. Further details and information about how to sign up for these events will be sent out soon via several e-mail distribution lists, including the CARES coordinators, agency training liaisons, and local agency supervisors.

CWW-1 Statewide Roll-Out

After the pilots have been transitioned to CWW-1, we will begin to rollout to the rest of the state. We have divided the state into four geographical regions and will rollout CWW-1 to each region over four consecutive months. The agencies listed in each region include both the IM agency responsible for IM programs and the W-2 agencies responsible for W-2 and related programs. Assuming that the pilot counties/agencies that have been asked to participate agree, the regions will be:

West/Southwest: Buffalo, Chippewa, Clark, Crawford, Dunn, Eau Claire, Grant, Green, Iowa, Jackson, Juneau, Lacrosse, Lafayette, Monroe, Pepin, Pierce, Richland, St. Croix, Trempealeau and Vernon.

North: Ashland, Barron, Bayfield, Burnett, Douglas, Florence, Forest, Iron, Langlade, Lincoln, Marathon, Marinette, Oconto, Oneida, Polk, Price, Rusk, Sawyer, Shawano, Taylor, Vilas, Washburn, Menominee, Red Cliff Tribe, Stockbridge-Munsee Tribe, Potawatomi Tribe, Lac Du Flambeau Tribe, Bad River Tribe, Sokaogon Tribe, and the Oneida Tribal Council.

East: Adams, Brown, Calumet, Dodge, Door, Fond Du Lac, Green Lake, Kewaunee, Manitowoc, Marquette, Outagamie, Portage, Sheboygan, Waupaca, Waushara, Winnebago and Wood.

Southeast: Kenosha, Milwaukee, Ozaukee, Racine, Walworth, Washington, and Waukesha.

CWW-1 Roll-Out Schedule

Region	Preparation	Training	Go Live!	Mandatory Transition
West/Southwest	5/2/05	6/6/05	7/6/05	8/22/05
North	6/6/05	7/6/05	8/1/05	9/16/05
East	7/6/05	8/1/05	9/6/05	10/20/05
Southeast	8/1/05	9/6/05	10/3/05	11/21/05

The CWW-1 implementation steps are the same for each of the regions.

I. **Preparation**

- Local agencies will need to obtain CARES Worker Web IDs for staff who will update CARES using CWW-1. CARES Worker Web IDs will initially provide the user with access to the CARES Training Environment only.
  ◊ The CWW ID is a WAMS ID. For those local agency staff who have a WAMS ID, the existing ID will need to be updated to allow for CWW access. For those who do not have a WAMS ID, they will need to obtain one that is set up to allow for CWW access.
  ◊ Individuals with mainframe CARES update access will be granted the same level of update access in CWW.
  ◊ Security staff will be carefully reviewing all staff with CARES access, both update and query, to ensure authorized access is appropriate.
  ◊ State security staff will be working closely with local agency security officers during this review process. The final outcome will be access required to perform workers' job duties.
  ◊ A follow-up Operations Memo will provide specifics for this process.
- State staff will communicate with each local agency individually to explain the implementation process and answer agency-specific questions. Included in this discussion will be a member of the state CWW-1 Implementation Team, as well as someone with Information Technology expertise in Internet connectivity. The CWW-1 Implementation Team member will be the direct contact for that local agency from CWW-1 preparation through the mandatory transition to CWW as questions and issues arise.
- We will also assist the agency's IT staff in testing CWW-1 connectivity and response time.

II. **Training**

Based on requests from local agencies for training that requires less commitment in terms of time and resources, Partner Training Services (PTS), the joint training partnership between DHFS Income Maintenance (IM) and DWD Workforce Development (WD) programs, has created a distance based model for CWW training. Distance based training for CWW-1 will be made available "just in time" - immediately prior to when local agencies are scheduled to transition to CWW-1 from the CARES mainframe. This program will leverage recent experience with creating and providing distance based courses, and will be a user-friendly blend of technologies backed up by training support such as online help, technical assistance, and telephone support. The PTS Learning Center (a.k.a. Pathlore) will be used to access and manage the CWW training programs.

The focus of training will not be on policy or overall process, but on how to use the new CWW tool. It will respond to such questions as:

- How are CWW pages laid out?
- How do I navigate from CWW page to CWW page?
- How will I process Client Registration in CWW?

- Only Client Registration and Application Entry are on CWW - how will I go from the web to the Mainframe to run eligibility?

CWW training will be mandatory for experienced workers who update CARES Client Registration (CR) and Application Entry (AE) and their direct supervisors. This includes those who work with all IM programs (except SeniorCare) as well as W-2 and Child Care.

Implementation efforts, including training, during the initial stage of the implementation of CWW-1 will be focused on those IM/W-2 local agency and state staff who update Client Registration and Application Entry in CARES. This will also include those who supervise or provide technical assistance to those agency staff.   Toward the end of 2005, other users who query CARES will be trained on and given access to CWW-1. Sometime in the summer of 2005, the new worker training program will be revised to include CWW. Until that time, new workers who complete the current CARES based new worker program must also complete the distance based CWW coursework and pass the CWW assessment.

The CWW training model consists of several different parts.

1) *Three optional distance based training readiness components:*
   - *CARES End User Feedback and Information Web Site* - If staff have not already done so, this is a chance to get a first look at the CWW-1.
     (Go to http://caresfeedback.wisconsin.gov/home/)
   - *Learner Support Services* – This site includes information about PC and Internet basics, as well as how to make the most of distance learning opportunities.   (This will NOT be taught as part of the CWW-1 training programs).
     http://dwd.wisconsin.gov/dwspts/LearnerSupport/LearnerSupport.htm
   - *System Access A to Z* – All CWW users need to know about IDs, passwords, and how to get support for CWW access. This information is expected to be available in early 2005 on the PTS Training web site.

2) *Five distance based courses*
   In the month before a rollout region's 'Go Live!' date, staff in those agencies in that area will be given access to CWW coursework. Because the training is a "just in time" model, there will not be a gap between the time that training is taken and the time that the learned concepts are needed. For this reason, courses will only be available the month prior to that date. The following courses are included in the CWW training program:

   - Course 1: Welcome to CWW World
   - Course 2: CWW Virtual Tool Kit
   - Course 3: Client Registration
   - Course 4: Eligibility Worker Processes
   - Course 5: Practical Application (optional)

   Workers (and their supervisors) who perform eligibility functions will be expected to complete courses 1-4, and workers (and their supervisors) who perform client registration

functions will be expected to take courses 1-3. The material covered in courses 1 and 2 will be tailored to fit the CR function and the AE function, and workers will take the course version that applies to the work they perform. It is recommended, but not required, that both worker types take course 5. Depending on the type of worker and whether or not s/he takes the optional course 5, participation in these training courses is expected to take 9-16 hours.

Courses have been designed to be as interactive as possible, so that there are several opportunities for hands–on exposure to the CWW. This is likely to be accomplished via individual access to the CWW training environment. This means that most (but not all) courses that are offered via the PTS Learning Center are intended for individual access, interaction and completion. Therefore, staff will need to be allowed sufficient time and environmental arrangements to complete this coursework independently.

In order to maximize participation in distance learning initiatives sponsored by PTS, it is recommended that trainees' computers be equipped with certain players, plug-ins, and viewers. These are free downloads that have been reviewed by Partner Training Services prior to use in our courses. For information about this software and how to access it, please see http://dwd.wisconsin.gov/dwspts/dl_viewers.htm

3) *An independent distance- based learning assessment*
    In conjunction with the IMAC and other advisory groups, a decision has been made to make a learning assessment part of this CWW training process.   A mandatory assessment will follow completion of the coursework. Trainees will be given two attempts to take the assessment. If the trainee passes the assessment on the first or second attempt, s/he will be given access to CWW Production update. If the trainee is unable to pass on the second attempt, s/he must attend a three-hour in person review lab in person, and then re-take the assessment. A trainee will not be granted access to the CWW until successfully completing the assessment.

    There will be one assessment for staff who deal with eligibility and are required to take courses 1-4, and another for staff who deal with client registration and are required to take courses 1-3.

4) *An in-person CWW review lab attended by those who do not pass the assessment*
    If a trainee fails the assessment twice, s/he must sign up for a CWW review lab. This lab will consist of repetition and practice of what was presented in distance coursework. There will not be new information presented in the lab sessions, however there will be a trainer available for questions as the trainee repeats and practices the material.

    To minimize travel, these labs will be offered at training centers within the rollout regions.

    To accommodate those who access the training program prior to their 'Go live!' date, there will be a lab offered at the end of that rollout region's training month. To accommodate those who do not take the training until the 'Go live!' month, another set of

lab sessions will be offered at the end of that month. Lab sessions will be three hours long, and will culminate in the trainee re-taking the appropriate CWW assessment for his/her worker type. More information about the process for signing appropriate staff up for these lab sessions will be made available as regions begin the rollout.

   5) Training support services
   As trainees are working through the CWW training coursework, training support will be available. All distance materials will indicate a contact person. There are also plans to support the CWW training process with a "training call center". We are attempting to implement a model that is patterned after the CARES Call Center, and includes live phone support at one main number as well as a generic e-mail box where training related questions can be asked and answered. More information about training support will be made available as regions begin rolling out.

III. **Go Live!**

   At this point, those staff with production update access to CWW-1 can begin to update their cases in the CARES Worker Web. Those with production update access can enter new cases, conduct reviews, do person adds, make changes, etc. There is no requirement that these staff use the CARES Worker Web for all cases. The mainframe screens will still be available for updating cases that have not been transitioned to the CARES Worker Web.

IV. **Mandatory Transition**

   In this step, all active cases for the agency that have not been transitioned to the CARES Worker Web will be transitioned overnight on the Mandatory Transition date indicated for that region. After this date, all updates (new RFAs, applications, changes, reviews, etc.) must be done using the CARES Worker Web.

Beyond CWW-1

In subsequent projects, we will transition all mainframe-based user interfaces from the mainframe to the web. These projects include:

1. **CARES Worker Web; Project 1.5** will build upon the accomplishments of CARES Worker Web, Project 1.0. Project 1.5 will implement:

   - Specific functionality for handling mail-in applications and reviews using web-based pages and processing (this is closely tied to the logic and processes that are being created by ACCESS, Version 3.3 (see below);
   - SeniorCare web-based pages rather than current mainframe screens;
   - Web pages necessary to complete the Asset Assessment for spousal impoverishment cases; and

- Web-based pages for alerts management, remaining Data Exchange screens, county-to-county case transfer screens and MMIS screens.

2. **CARES Worker Web, Project 2.0** will be a series of versions of the CWW that continue to migrate the CARES user-interface from the mainframe to the Internet.

- Project 2.1 will move post-eligibility application entry screens, eligibility screens and confirmation to the CWW.

- Project 2.2 will move client scheduling from the mainframe to the CWW using off-the-shelf calendar software with a customized connection to CARES. Project 2.2 will also move the caseload transfer and management functions and finish security maintenance screens movement from the mainframe to the web.

- Project 2.3 will connect the Electronic Case File to the CARES Worker Web pages and will move client notices from the mainframe to the CWW.

3. **CARES Worker Web, Project 3.0** will complete the migration of <u>all</u> user-based interfaces from the mainframe to the Internet, including history maintenance (audit trails), FoodShare Benefit Issuance activities, and the Benefit Recovery screens.

In addition there are two other large systems projects that are directly linked to the CARES Worker Web Projects:

1. **ACCESS, Version 3** is a series of projects originally described in the Food Stamp Program Participation Grant application submitted to the U.S. Department of Agriculture. The grant awarded $1.7 million to the State of Wisconsin to build ACCESS and evaluate its effectiveness in various demonstration settings. Acceptance of the grant requires the State of Wisconsin to complete and evaluate ACCESS by June 2006. We have already implemented ACCESS, Version 1 & 2. Version 1 was implemented in August 2004 and included self-assessment for FoodShare, Family Medicaid/BadgerCare and SeniorCare. Version 2 was implemented in December 2004 and expanded ACCESS to include self-assessment for:

◊ Medicaid for the Elderly, Blind and Disabled,
◊ The Supplement Food Program for Women, Children and Infants (WIC),
◊ The Emergency Food Assistance Program (TEFAP),
◊ The Summer Food Service Program,
◊ The Free/Reduced School Breakfast/Lunch program, and
◊ Federal and state earned income tax credit (EITC), the federal child tax credit and the Wisconsin Homestead tax credit

Version 3.0 includes three components:

- Version 3.1 will allow Medicaid and FoodShare recipients to query their case and benefit status using a secured Internet site.

- Version 3.2 will allow Medicaid and FoodShare recipients to report changes to their workers via a secured Internet site.

- Version 3.3 will allow citizens to apply for Medicaid and FoodShare through the Internet. (This is closely tied to the logic and processes that are being created by CWW, Project 1.5).

2. **The Electronic Case File (ECF)** will allow local agencies to scan and create images of verification documents and forms used to determine eligibility and benefits for Income Maintenance programs and store these images on a secured Internet site. ECF also allows agency workers, as well as state staff, to search, query, view and annotate images in the ECF. The ECF will be connected with the CWW in Project 2.

All IM and Workforce Development staff affected by these system changes will receive more information about them in the coming months and years.

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